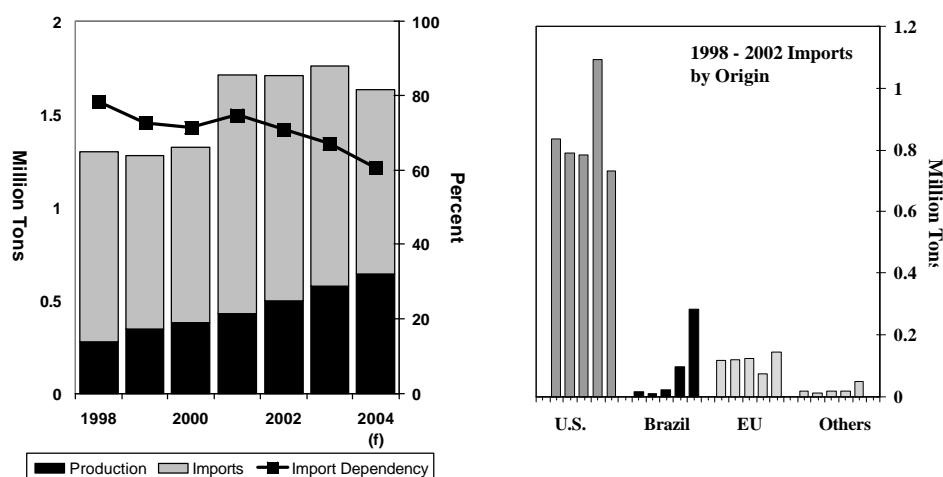


# Russia's Broiler Situation

	1997	1998	1999	2000	2001	2002	2003 (p)	2004 (f)
(1,000 tons; ready to cook equivalent)								
Production	200	280	350	380	430	500	580	640
Imports	1,266	1,020	930	943	1,281	1,208	1,180	990
Exports	5	3	1	3	3	1	1	1
Consumption	1,461	1,297	1,279	1,320	1,588	1,697	1,809	1,709

## Russia's Production Gains Drive Their Import Dependency Down



Broiler meat imports in 2004 are forecast at 990,000 tons, down 16 percent from the revised 2003 level due to quota restrictions. Imports in 2003 remained strong due to unrestricted access during through April, despite a prorated annual quota amount of 744,000 metric tons. Heavy investment in the domestic broiler industry will expand production capacity and increase efficiency through vertical integration, but these efforts may not be able to meet expected demand for broiler meat in 2004. In 2004, production is forecast at 640,000 tons, a 10 percent increase over the revised 2003 estimate. Even with the 10-percent increase in production, consumption is forecast to fall nearly 6 percent, and could create upward pressure on poultry prices. In 2002, private stocks swelled to 130,000 tons in anticipation of tight supplies under the import quota. However, strong domestic demand and tight supplies in 2004 should reduce these private stocks of broiler meat to zero. In 2002, U.S. broiler exports to Russia, the largest market for the United States, were valued at \$353 million, 42 percent below the record level in 2001.

**Russia**  
**BROILER IMPORTS**  
(in metric tons)

Whole Chickens

Origin	1995	1996	1997	1998	1999	2000	2001	2002
Brazil	0	14,064	33,337	16,091	6,610	13,883	59,711	132,194
Canada	24	88	137	48	0	73	0	0
China	0	26	391	140	35	0	441	960
Czech Republic	0	84	18	0	103	0	0	0
EU-15	35,255	43,552	39,529	33,446	15,222	17,303	8,509	12,774
Hungary	0	0	1,084	600	982	398	563	422
Poland	0	0	0	64	386	266	455	800
Ukraine	0	0	0	67	0	185	37	482
United States	892	4,005	2,975	1,719	4,157	31	310	22
Others	3,312	3,591	1,735	1,148	0	32	92	127
<b>Total</b>	<b>39,483</b>	<b>65,410</b>	<b>79,206</b>	<b>53,323</b>	<b>27,495</b>	<b>32,171</b>	<b>70,118</b>	<b>147,781</b>
US market share	2%	6%	4%	3%	15%	0%	0%	0%

Chicken Parts

Origin	1995	1996	1997	1998	1999	2000	2001	2002
Brazil	0	573	297	491	3,270	6,884	37,223	150,186
Canada	5,326	4,605	5,918	1,422	1,412	2,737	3,839	12,564
China	21	76	236	741	499	1,902	10,466	25,366
Czech Republic	0	0	1	0	1	0	18	0
EU-15	77,074	67,720	101,635	80,028	102,822	104,171	62,857	130,297
Hungary	0	0	397	293	712	446	449	241
Poland	222	44	111	551	3,233	490	619	1,560
Ukraine	0	0	0	3	812	9,287	308	3,060
United States	727,371	943,293	1,039,437	851,546	783,252	779,938	1,077,958	731,264
Others	2,125	2,534	8,618	1,037	1,031	444	794	2,873
<b>Total</b>	<b>812,139</b>	<b>1,018,845</b>	<b>1,156,650</b>	<b>936,112</b>	<b>897,044</b>	<b>906,299</b>	<b>1,194,531</b>	<b>1,057,411</b>
US market share	90%	93%	90%	91%	87%	86%	90%	69%

Further Processed Chicken Products

Origin	1995	1996	1997	1998	1999	2000	2001	2002
Brazil	0	0	0	0	0	0	13	114
Canada	140	277	213	143	0	0	31	0
China	0	0	0	0	0	0	60	0
Czech Republic	0	0	53	65	62	33	768	230
EU-15	1,994	2,831	3,857	2,522	1,250	1,142	1,286	2,359
Hungary	0	0	37	69	4	39	182	39
Poland	0	0	0	12,016	2,772	695	461	228
Ukraine	0	0	13	97	16	42	173	78
United States	0	0	24,391	15,040	1,168	2,930	12,917	1
Others	1,027	837	1,382	652	101	104	293	29
<b>Total</b>	<b>3,161</b>	<b>3,945</b>	<b>29,946</b>	<b>30,604</b>	<b>5,373</b>	<b>4,985</b>	<b>16,184</b>	<b>3,078</b>
US market share	0%	0%	81%	49%	22%	59%	80%	0%

<b>Grand Total</b>	<b>854,783</b>	<b>1,088,200</b>	<b>1,265,802</b>	<b>1,020,039</b>	<b>929,912</b>	<b>943,455</b>	<b>1,280,833</b>	<b>1,208,270</b>
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**Russia**  
**BROILER IMPORTS**  
**(in metric tons)**

US market share	85%	87%	84%	85%	85%	83%	85%	61%
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Source: United Nations Trade Statistics and "Export-to" data except for Czech Rep, Hungary, and Ukraine  
Russian Import data (highlighted in bold) are used for Czech Republic, Hungary, and Ukraine  
U.S. exports to Russia include exports to Estonia and Latvia

Note 1. Whole chicken includes HS 020711 and 020712, but, U.S. whole chicken exports to Russia include HS 0207104020, 0207110020, 0207120020, and 0207210020

2. Chicken parts include 020713 and 020714

3. Prepared chicken include 160232, however, U.S. prepared chicken exports to Russia include 1601000010, 1602320035, 1602320050, and 1602320090